Avatar Support Guide

Sacramento County Avatar Training and Support

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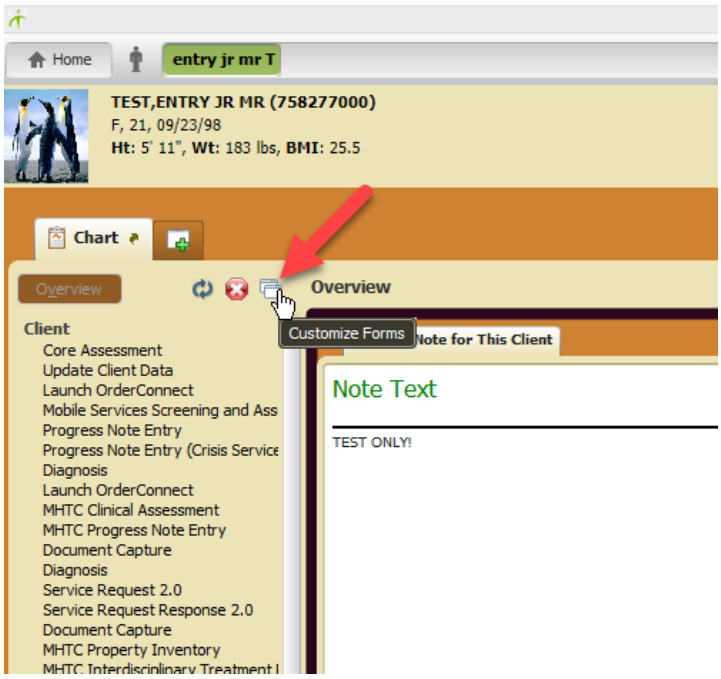
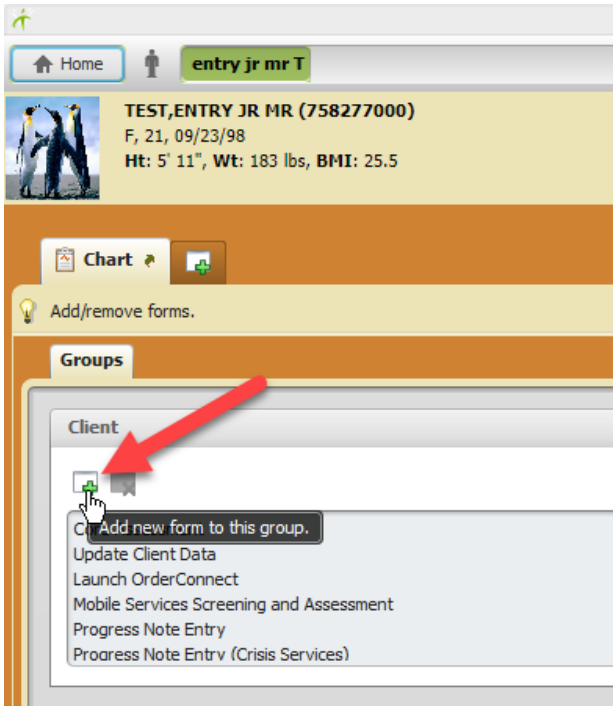
How to Add Document Capture or other forms to Chart view

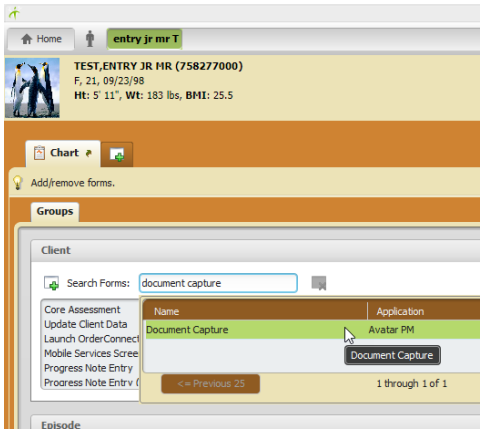
1. Click on the **“Customize Forms”** icon



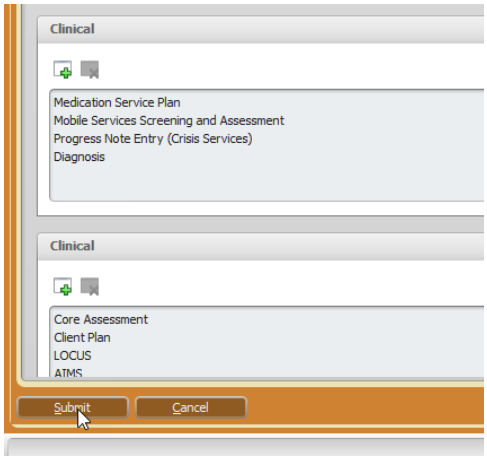
2. Click on the **“Add new form to this group”** icon



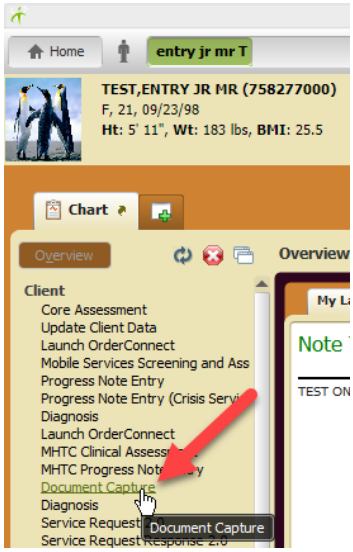
3. Type in “Document Capture” or the name of the form to search. Then double click on the name of the form in the search results.



4. Click on the “Submit” button at the bottom



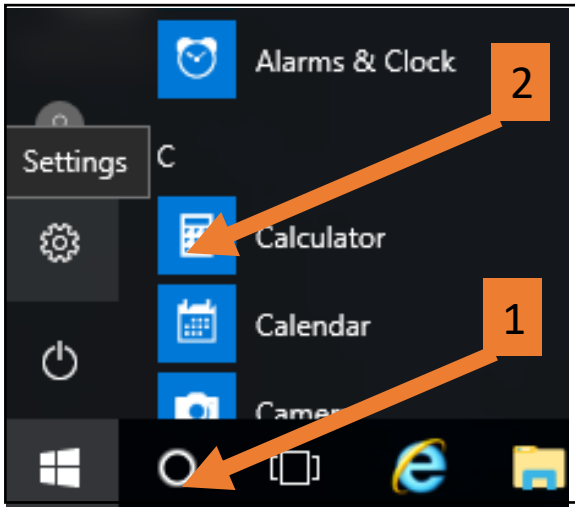
5. Verify that the option has been added and click on “Document Capture” to launch.



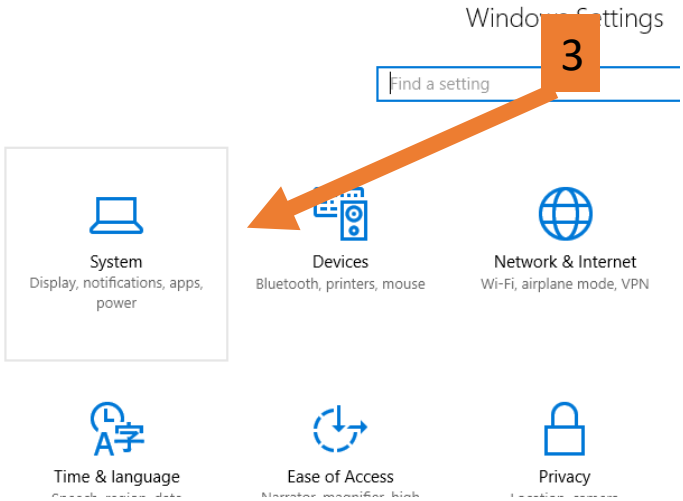
****Note** You can also search for "Client Document Capture" from Search Forms if you want to open it separately.**

Changing the Default Browser

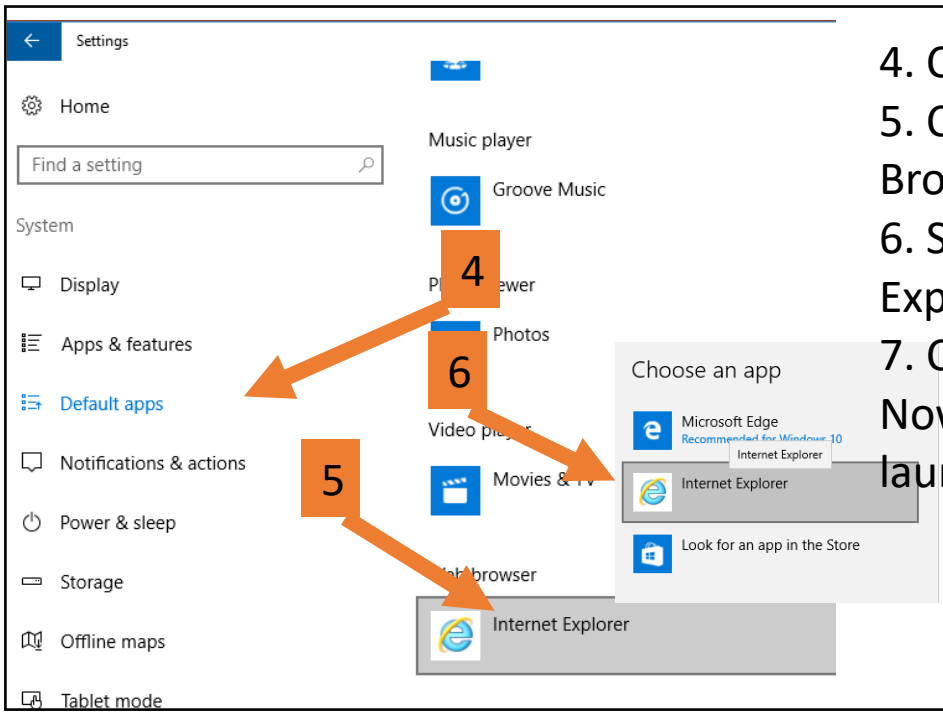
The preferred browser for myAvatar is Internet Explorer



1. Click on the Windows icon in the lower right hand side of your screen.
2. Click on the “Settings” Icon, to Open the “Windows Settings” window



3. Click on the “System” icon

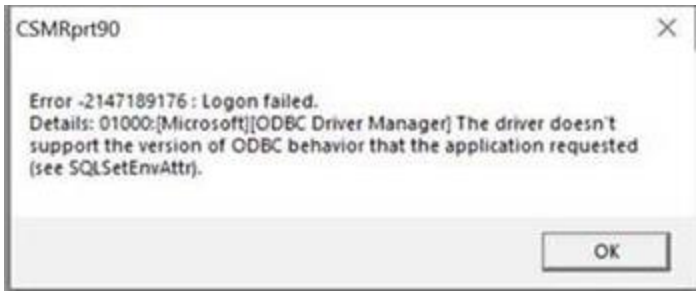


4. Click on **“Default Apps”**
5. Click on the “Web Browser” section
6. Select the “Internet Explorer” browser
7. Close the Window

Now you should be able to launch Avatar.

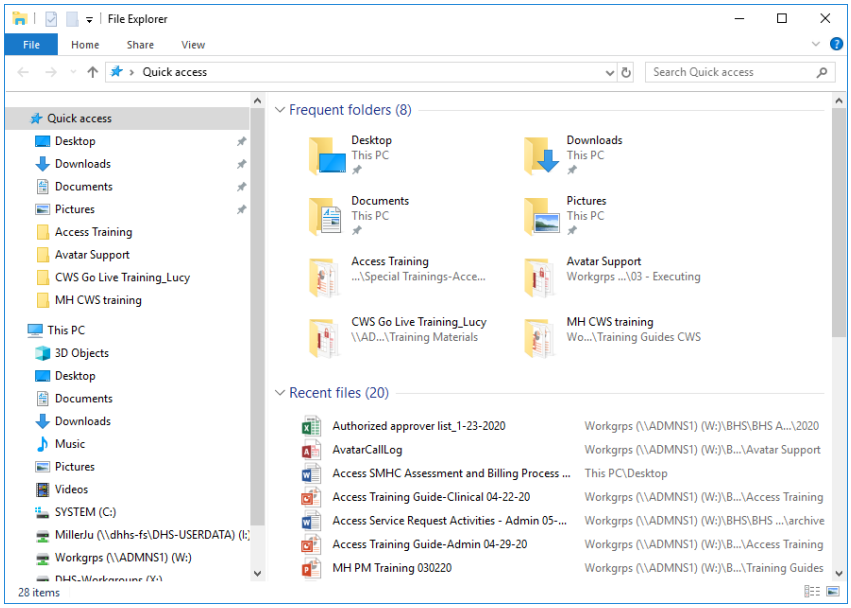
Clearing Report errors

If you receive the following error it may be due to the archived copy of the report being corrupt and needs to be deleted.



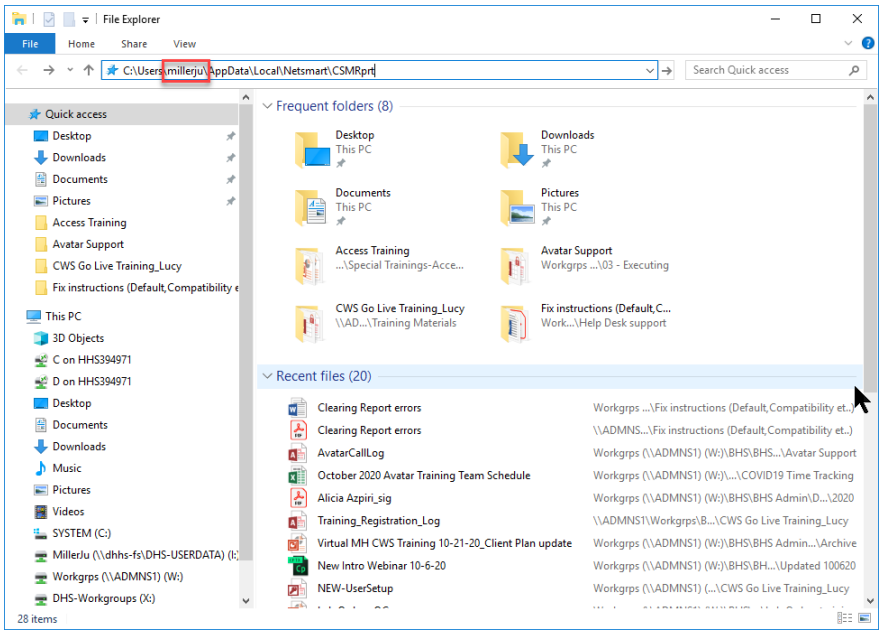
1. Click on the File Explorer Icon on the bottom of the computer screen

2. A file Explorer window will open

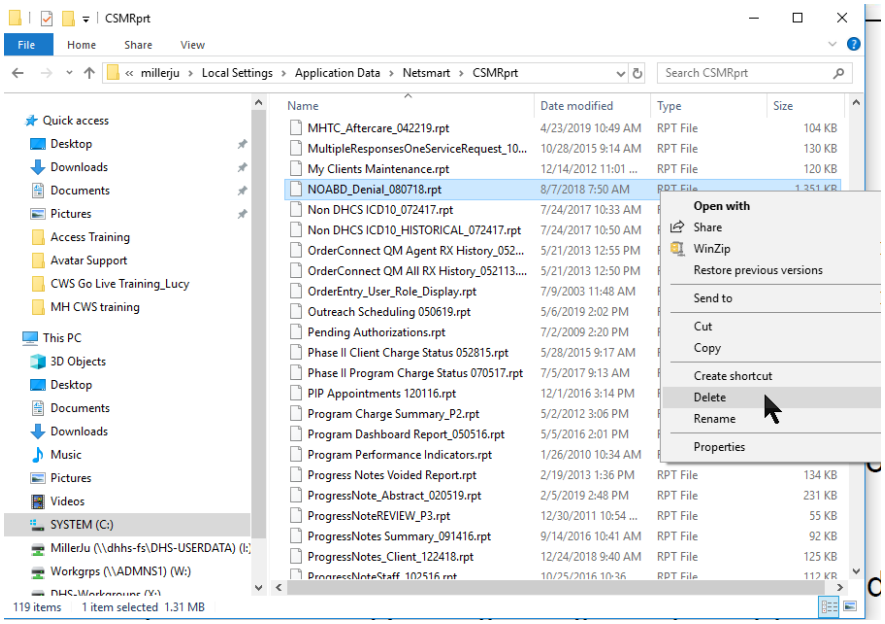


3. Copy and Paste the following link where “Quick Access” is and replace the <your computer login here> with your computer username. (see example below)

   C:\Users\<your_computer_name_here>\AppData\Local\Netsmart\CSMRprt



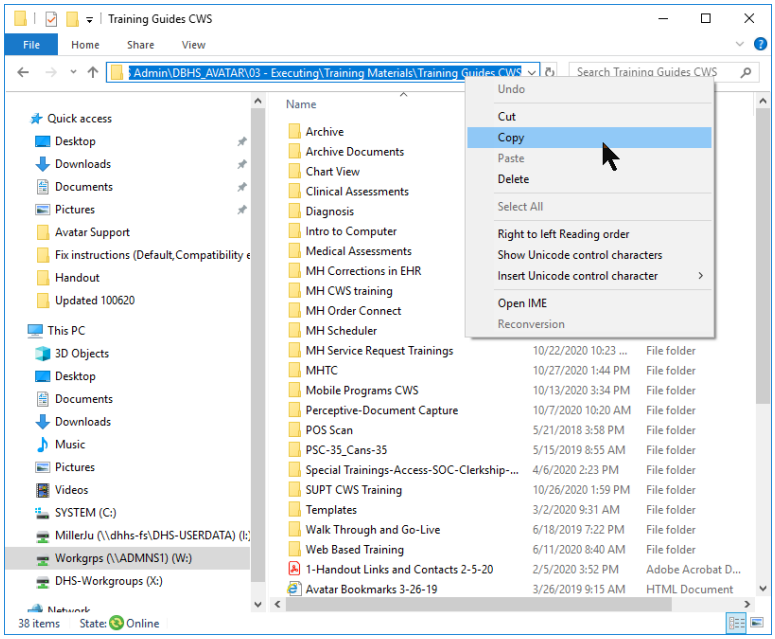
4. Press Enter and it should take you to the correct Folder. Find the Report you are having an issue with and right click and choose “Delete”. And the report should remove.



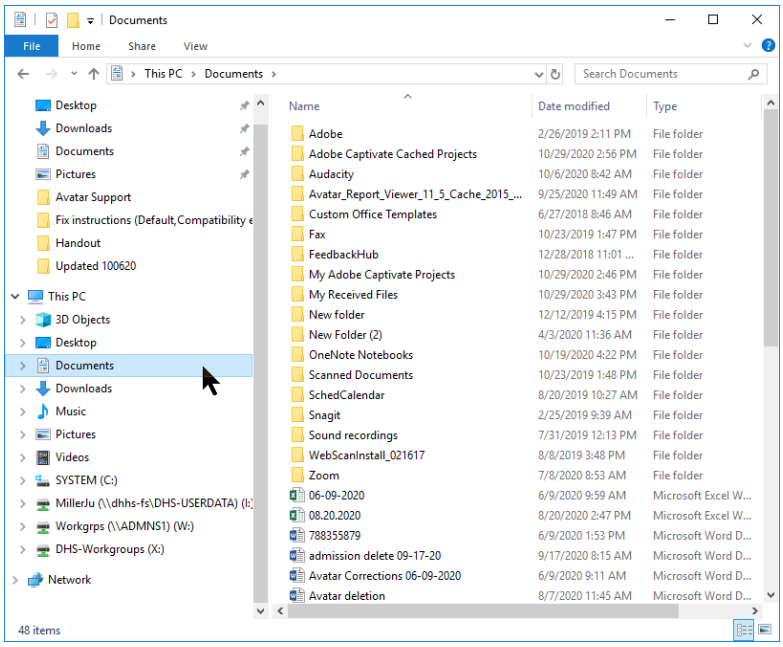
5. Restart the Computer
6. Open Avatar
7. Try to re-run the report

Creating a shortcut in the Documents folder for Document Capture

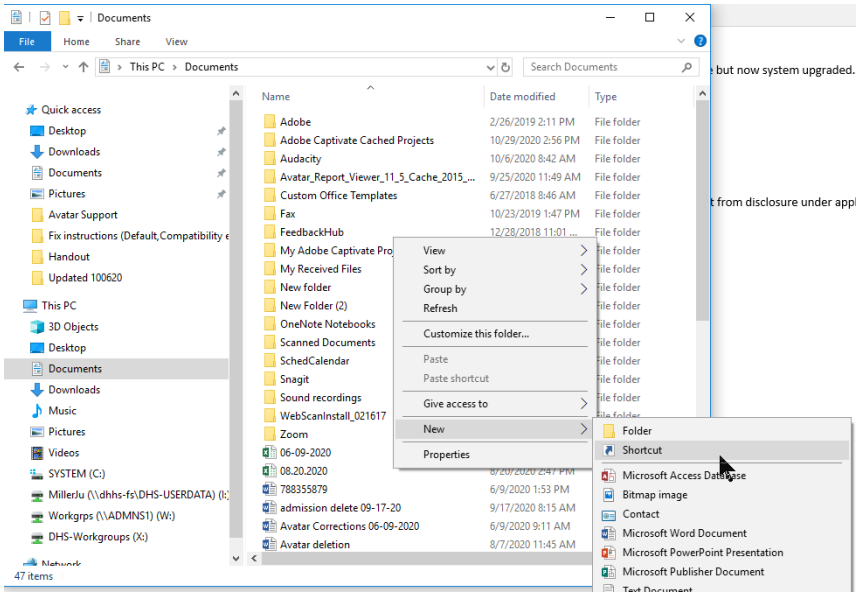
1. Go to the folder you normally store your documents in your shared drive.
2. Copy the shortcut there
   - Click on the path in the window
   - Right click on the highlighted address
   - Select Copy



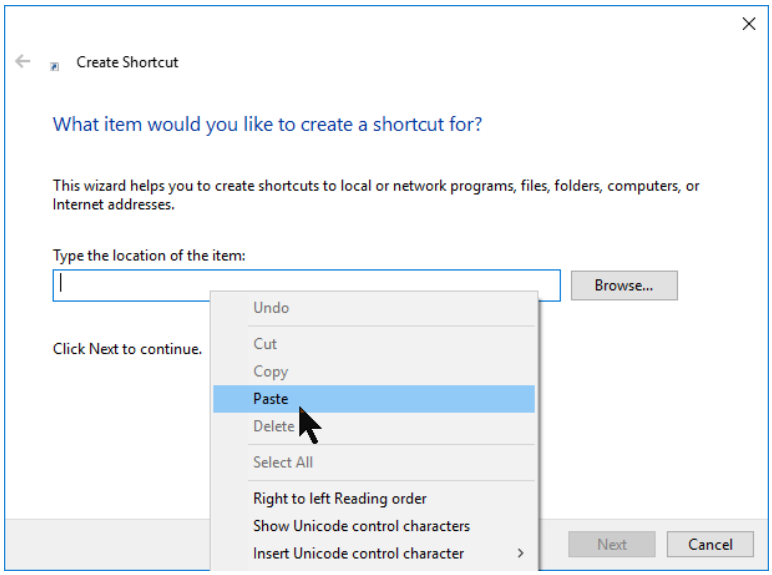
3. Click on the Documents link on the left



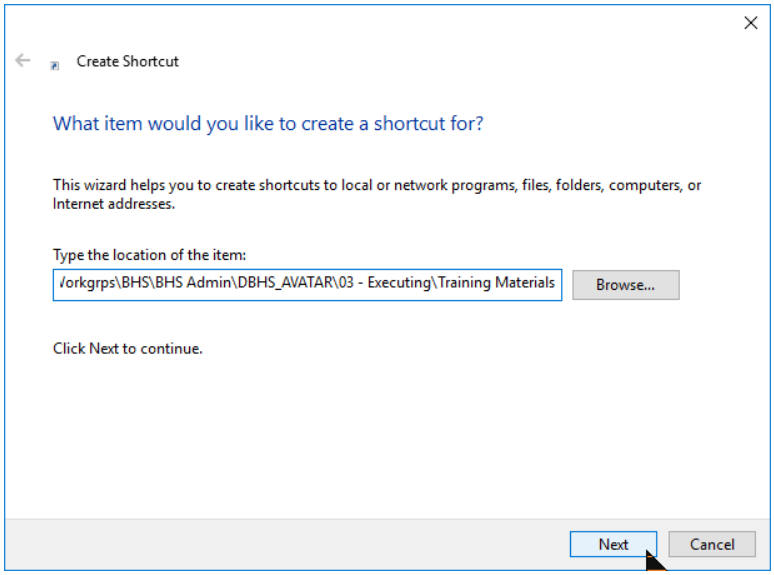
4. Right click in an empty space and and navigate to “New” then Shortcut



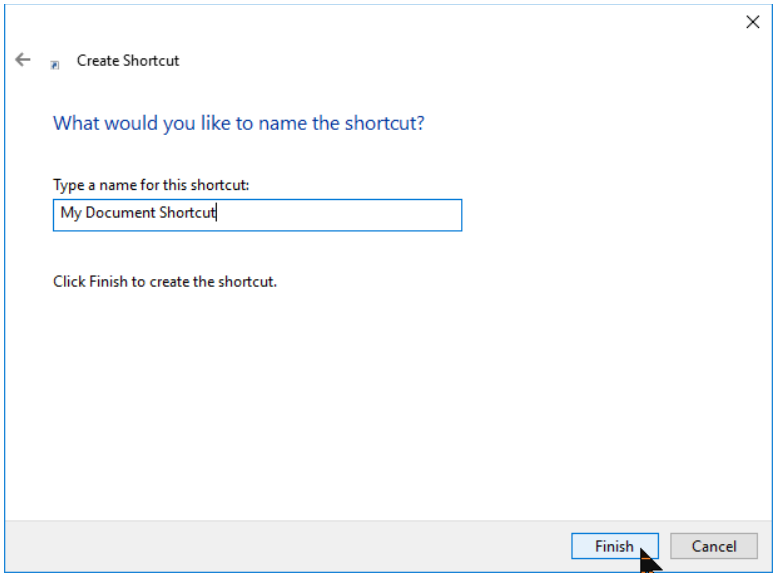
5. Right click on the field and select “Paste”



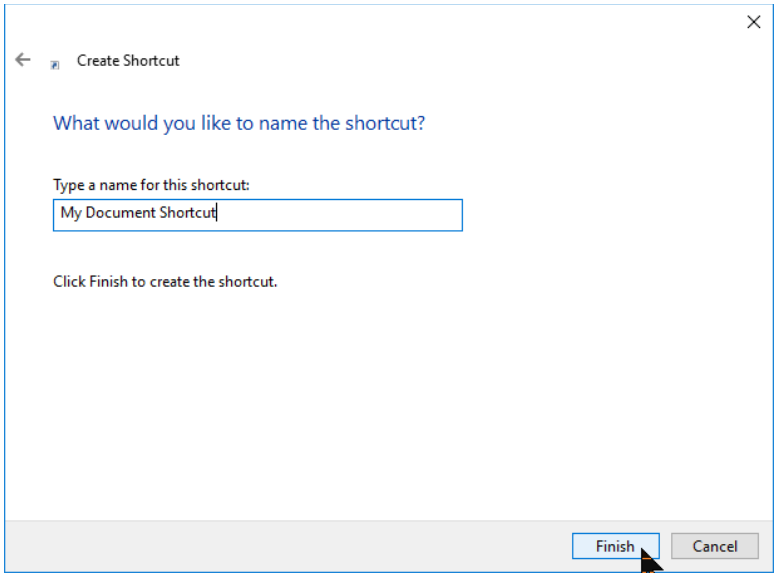
6. Click “Next”



7. Name your Shortcut to the folder

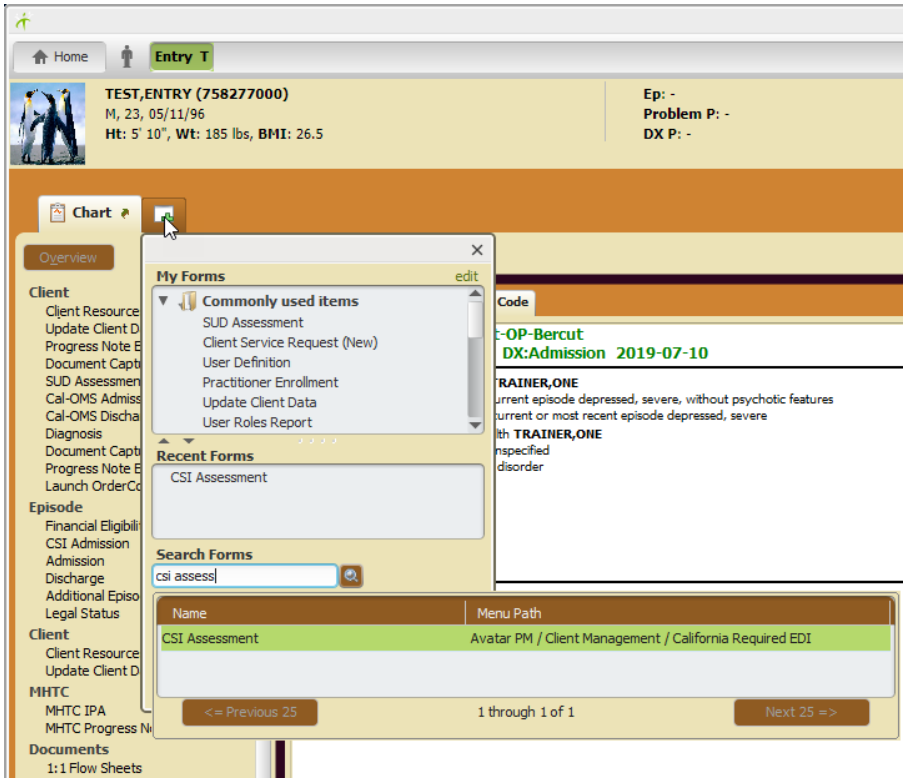


8. Then you should be able to access that folder each time from the Documents Folder

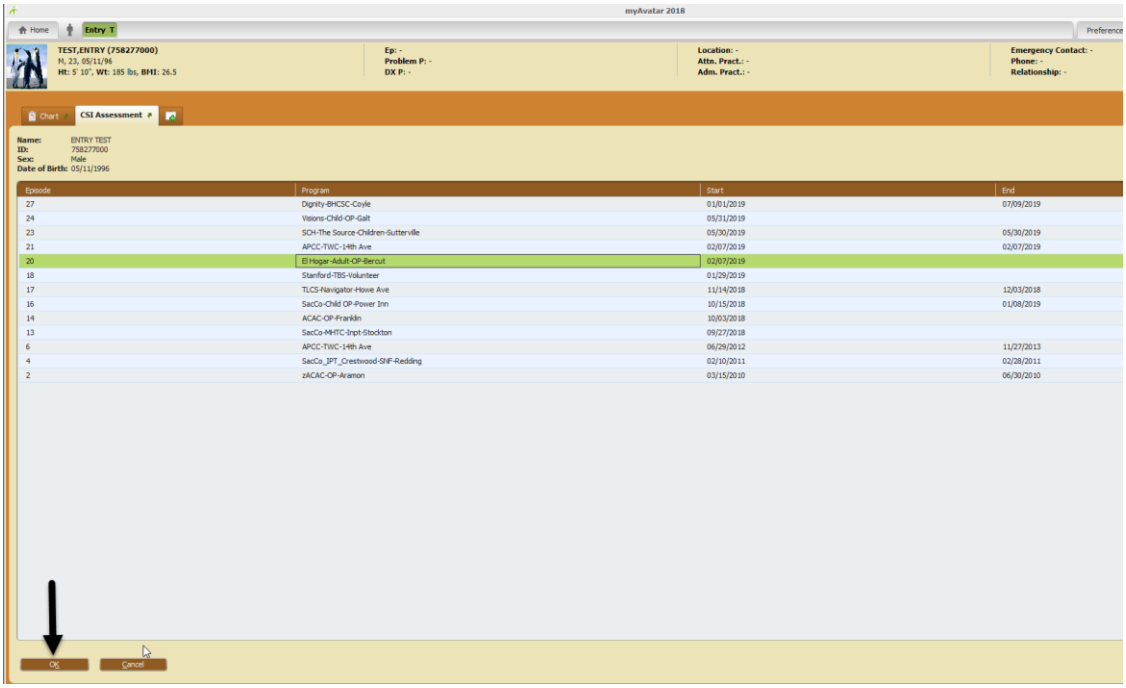

Create Shortcut
What would you like to name the shortcut?
Type a name for this shortcut:
My Document Shortcut
Click Finish to create the shortcut.
Finish
Cancel

Deleting a Draft Assessment from the Pre-Display

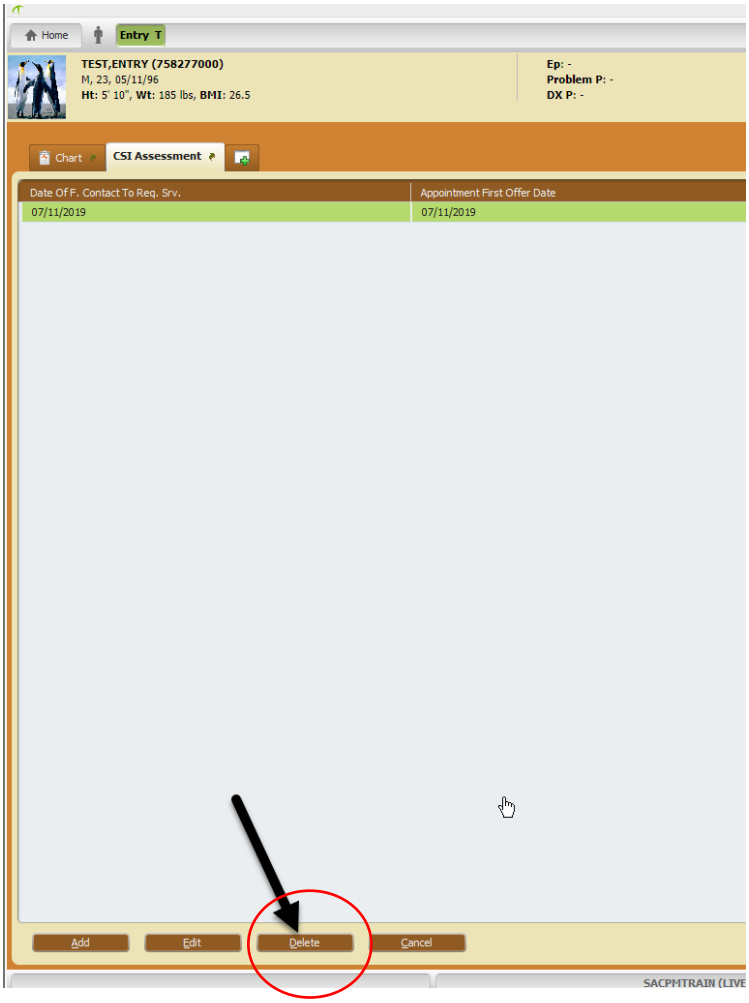
1. Click on the Green + sign from the Chart view or go to search forms on the Home Screen
2. Search for the ***Draft Assessment*** you want to delete and double click to open the form from the search results



3. Select **Episode** from Pre-Display



4. Highlight assessment and click “Delete”

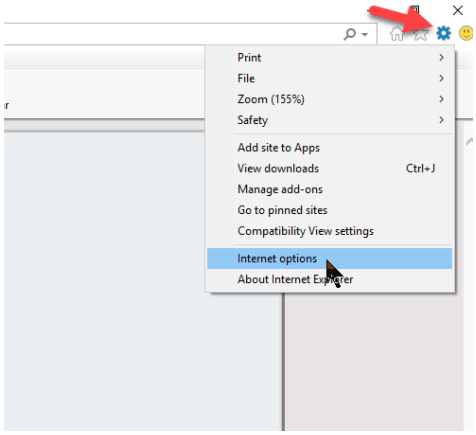


OrderConnect-2 Factor Authentication Error Fix

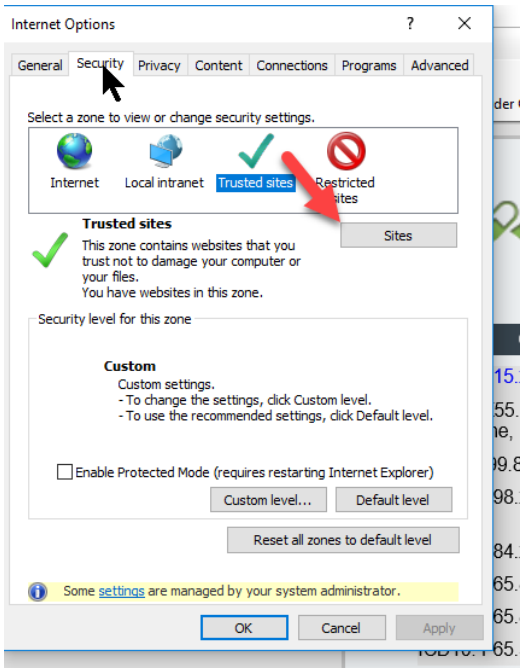
This is for those who prescribe medications

This may be caused by a change in the Verizon URL and the steps below should correct the issue.

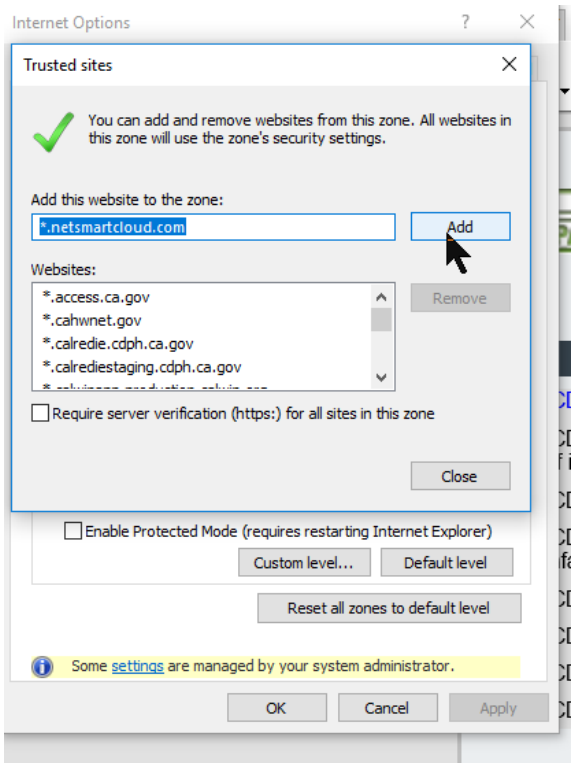
1. While in Order Connect on Internet Explorer, click on the **Gear** Icon in the upper right side
2. Click on **"Internet Options"**



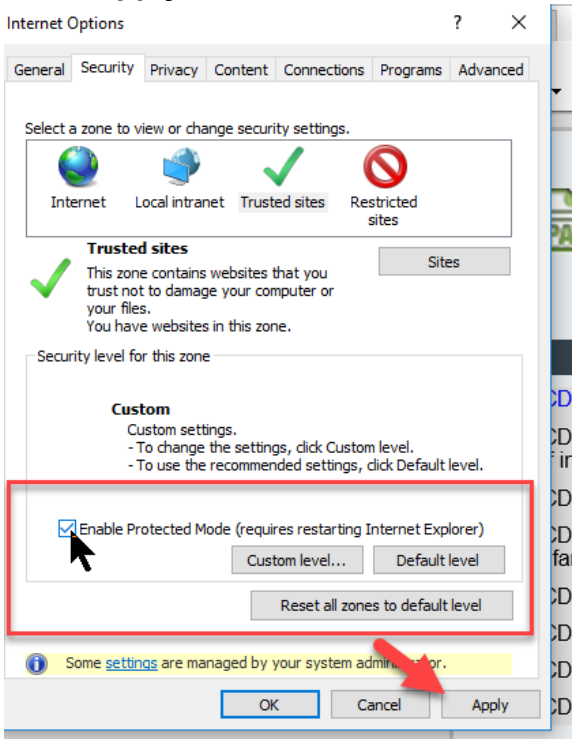
3. Click on the **"Security"** tab
4. Click on the **"Sites"** button



5. In the **"Add this website to the zone"** field type in **.netsmartcloud.com*
6. Click the **"Add"** button and then **"Close"**

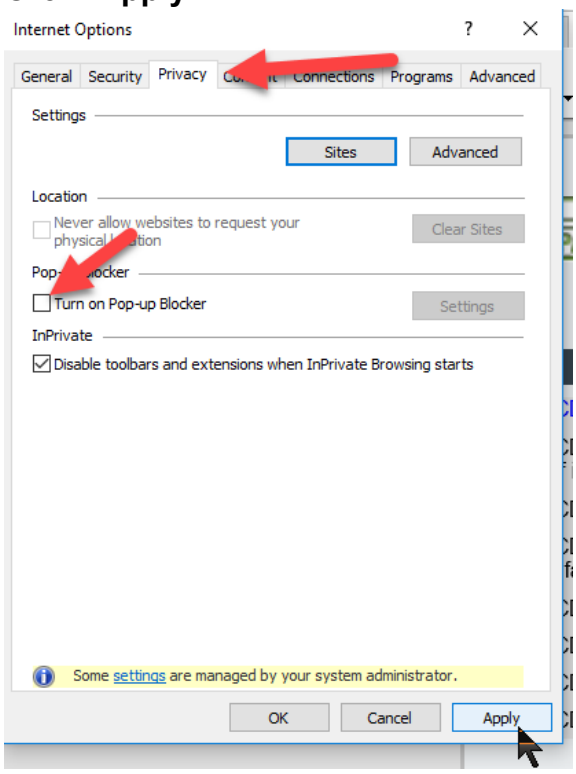


7. Click **“Enable Protected Mode”** checkbox
8. Click **“apply”**

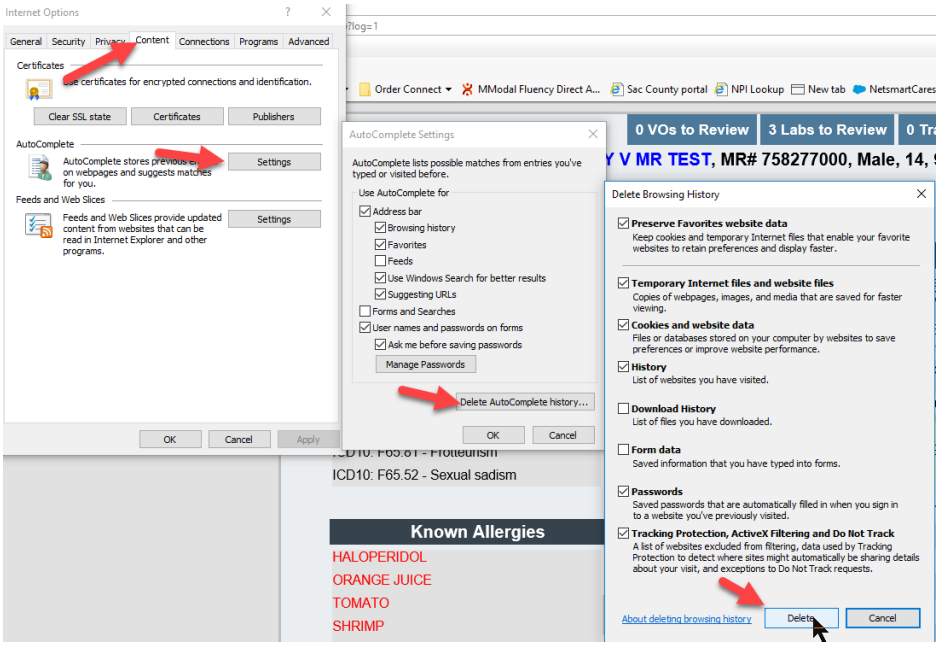


9. Click on the **“Privacy”** tab
10. Uncheck the **“Turn on Pop-Up Blocker”** checkbox

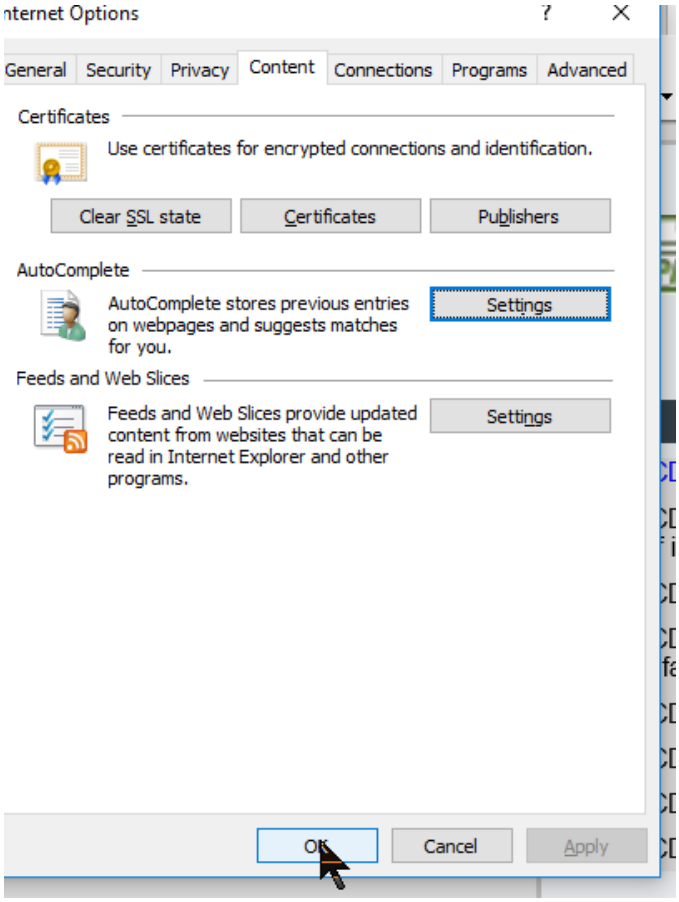
11. Click **“Apply”**



12. Click on the **“Content”** tab
13. Click the **“Settings”** button
14. Click **“Delete Autocomplete History”** button
15. Click **“Delete”** button and wait a few seconds
16. Click **“Ok”** on the **“AutoComplete Settings”** screen
    a. You should check the same options on the **“Delete Browsing history”** window as you see below.



17. Click **“Ok”** the Internet options screen to close it

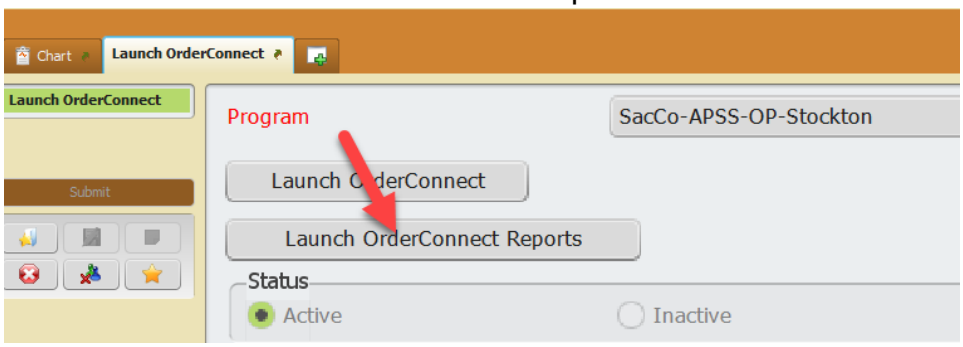


18. Close Internet Explorer and Re-launch Order Connect

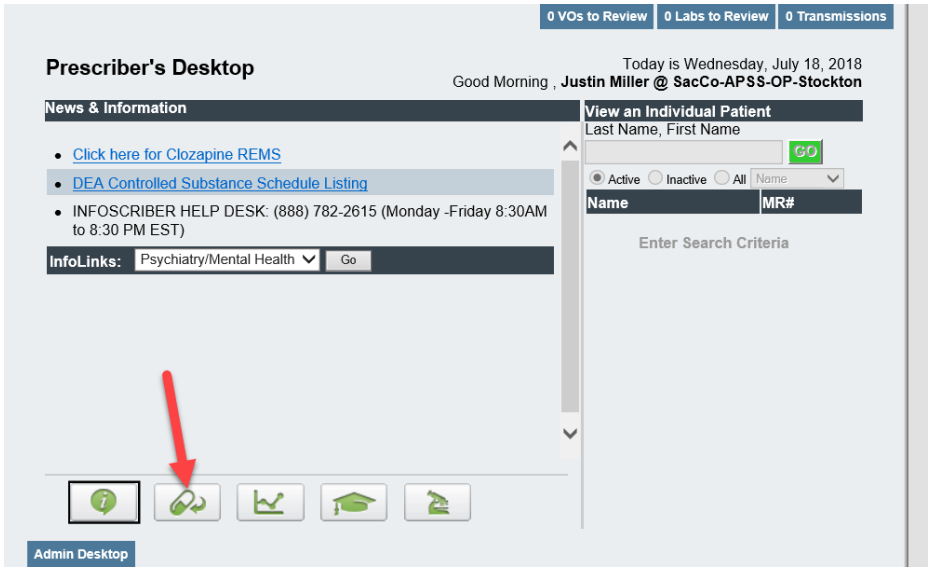
Transfer Pending Prescription

This is for those who prescribe medications

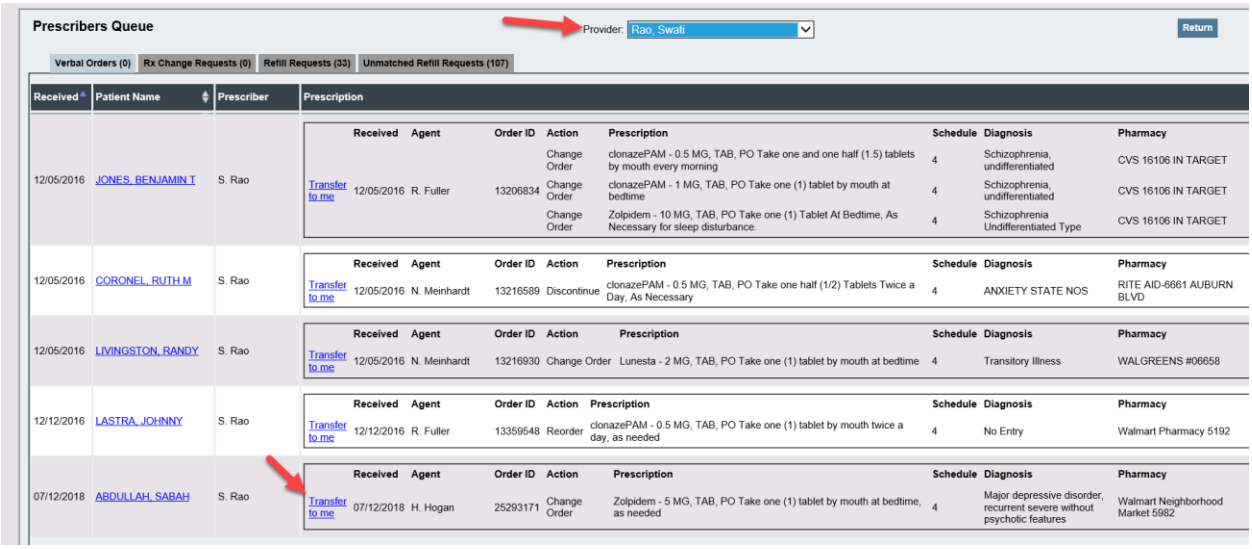
1. Open Launch Order Connect for any client ***(you can transfer more than 1 prescription and can select prescriptions from different providers in this screen)***
2. Click on “Launch Order Connect Reports”



3. Click on the “Prescriber Queue” icon

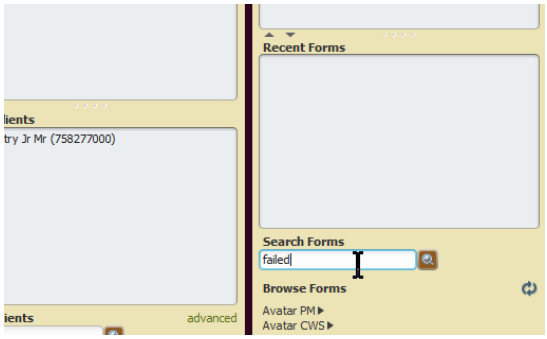


4. Once in the Prescribers Queue click on the Provider dropdown and select who the original Prescription was sent to.
5. Find the Prescription and select “Transfer to Me” link and then follow the prompts.


Prescribers Queue
Provider: Rao, Swati
Return
Verbal Orders (0)
Rx Change Requests (0)
Refill Requests (33)
Unmatched Refill Requests (107)
Received
Patient Name
Prescriber
Prescription
12/05/2016 JONES, BENJAMIN T S. Rao
Transfer to me 12/05/2016 R. Fuller 13206834 Change Order clonazePAM - 1 MG, TAB, PO Take one (1) tablet by mouth at bedtime 4 Schizophrenia, undifferentiated CVS 16106 IN TARGET
Change Order clonazePAM - 0.5 MG, TAB, PO Take one and one half (1.5) tablets by mouth every morning 4 Schizophrenia, undifferentiated CVS 16106 IN TARGET
Change Order Zolpidem - 10 MG, TAB, PO Take one (1) Tablet At Bedtime, As Necessary for sleep disturbance. 4 Schizophrenia Undifferentiated Type CVS 16106 IN TARGET
12/05/2016 CORONEL, RUTH M S. Rao
Transfer to me 12/05/2016 N. Meinhardt 13216589 Discontinue clonazePAM - 0.5 MG, TAB, PO Take one half (1/2) Tablets Twice a Day, As Necessary 4 ANXIETY STATE NOS RITE AID-6661 AUBURN BLVD
12/05/2016 LIVINGSTON, RANDY S. Rao
Transfer to me 12/05/2016 N. Meinhardt 13216930 Change Order Lunesta - 2 MG, TAB, PO Take one (1) tablet by mouth at bedtime 4 Transitory Illness WALGREENS #06658
12/12/2016 LASTRA, JOHNNY S. Rao
Transfer to me 12/12/2016 R. Fuller 13359548 Reorder clonazePAM - 0.5 MG, TAB, PO Take one (1) tablet by mouth twice a day, as needed 4 No Entry Walmart Pharmacy 5192
07/12/2018 ABDULLAH, SABAH S. Rao
Transfer to me 07/12/2018 H. Hogan 25293171 Change Order Zolpidem - 5 MG, TAB, PO Take one (1) tablet by mouth at bedtime, as needed 4 Major depressive disorder, recurrent severe without psychotic features Walmart Neighborhood Market 5982

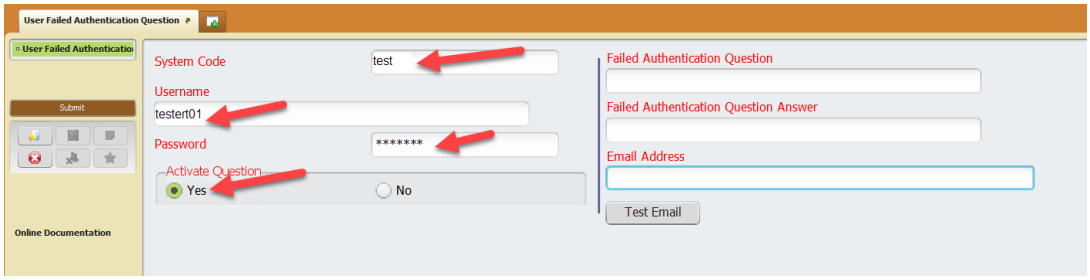
Failed Authentication question setup

1. Log into Avatar
2. Go to the Search forms Field
3. Type in the word “Failed”



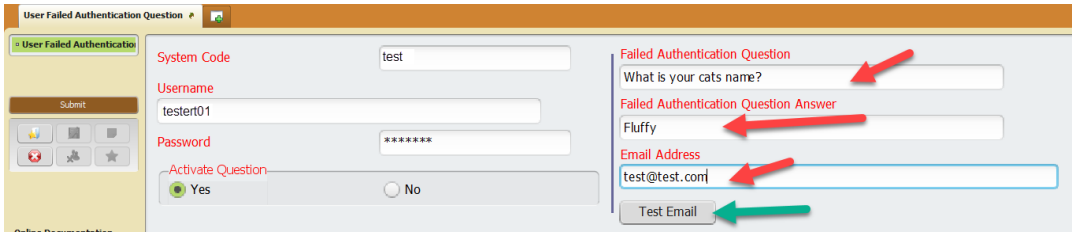
4. Once the Results appear, double click on the “User Failed Authentication Question”

5. Left Side- Enter the information as if you are logging into Avatar
   --(you may need to click in the field before you enter data)
   a. Enter YOUR System Code
   b. Enter YOUR Username
   c. Enter your Password (press enter)
      i. This will open all fields on form
   d. Click on “Activate Question” “Yes”

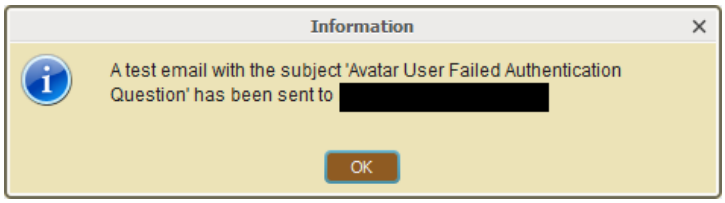


6. Right Side- Complete each field
   a. Create a “Failed Authentication Question”

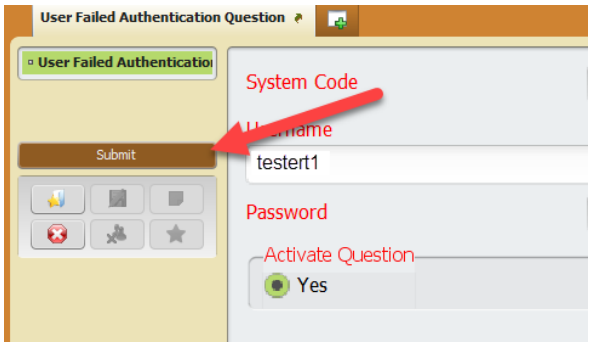
b. Create an answer in the “Failed Authentication Question Answer” field
c. Enter your email address in the “Email Address” field
d. Click on the “Test Email” button



7. You should receive confirmation that the email has been sent

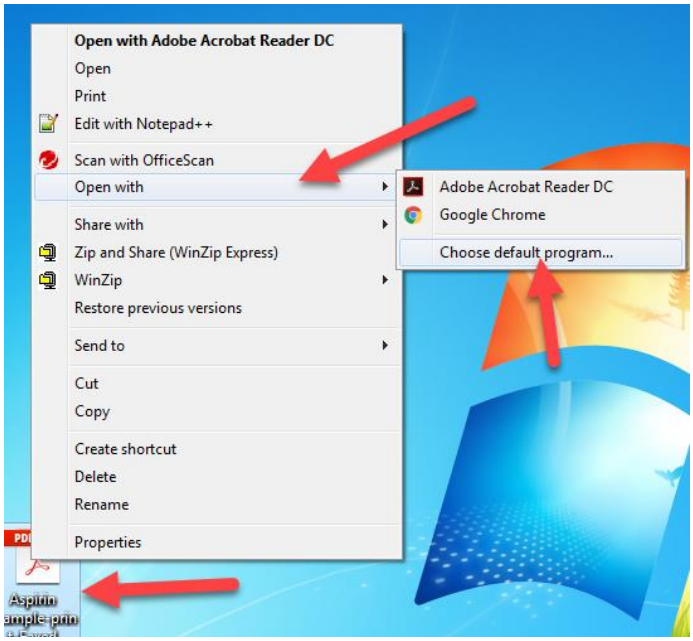


8. Click on “Submit” on the left to Save and Close

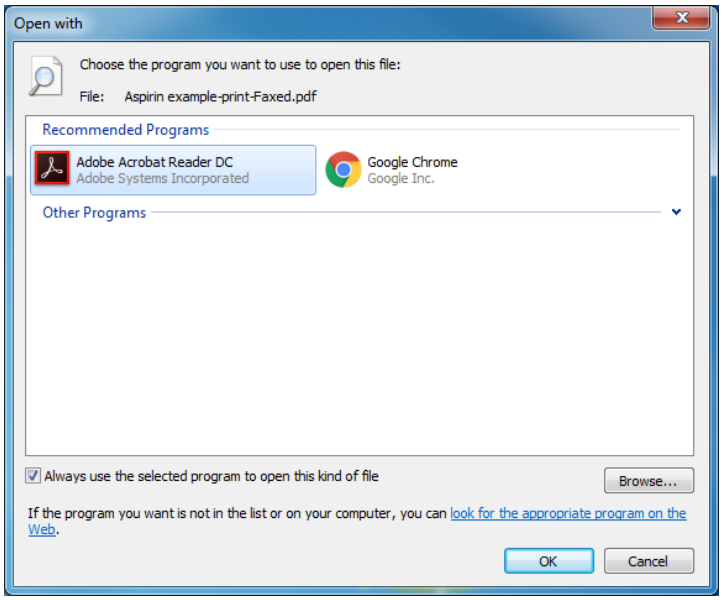


Fix instructions for PDF association

1. Find a PDF document.
    a. Either on your desktop or in a folder
2. Right click (with the mouse) to open the menu
3. Click on “Open with”
4. Click on “Choose default program”



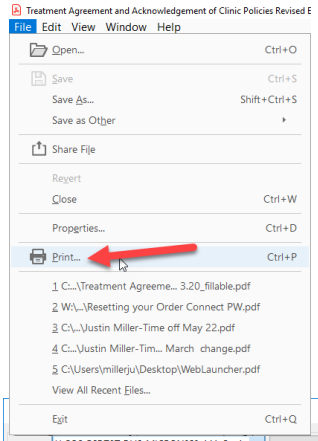
5. Choose your Adobe Reader program.
6. Click on Ok



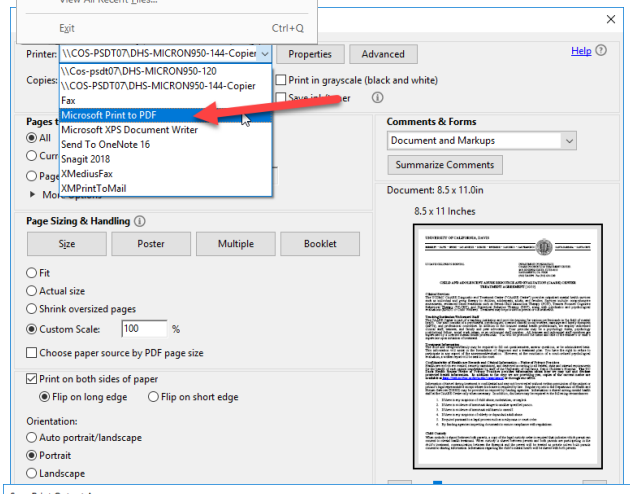
7. Try to Open document in Avatar

Printing to PDF

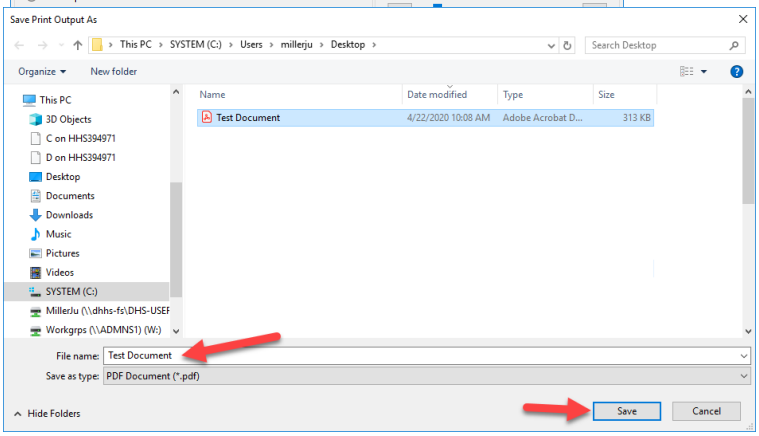
1. Click on “File” on the top left
2. Select “Print”



3. Select “Microsoft Print to PDF”
4. Click on the “Print” button



5. Select the location of where you want to save the document
6. Create a File Name
7. Click on the **“Save”** button



Internet Explorer and Java issues

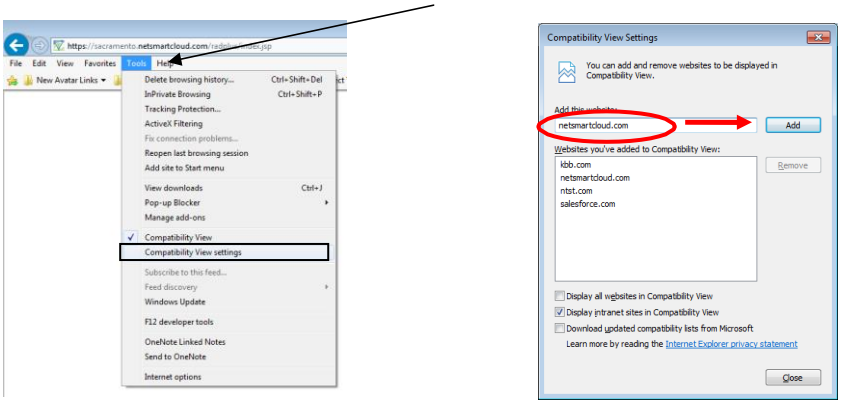
Status 404 error

If someone calls in with a status 404 error it is usually because they are on a newer version of Internet Explorer either 10 or 11. There may need to be 2-3 changes made in order to make Avatar work.

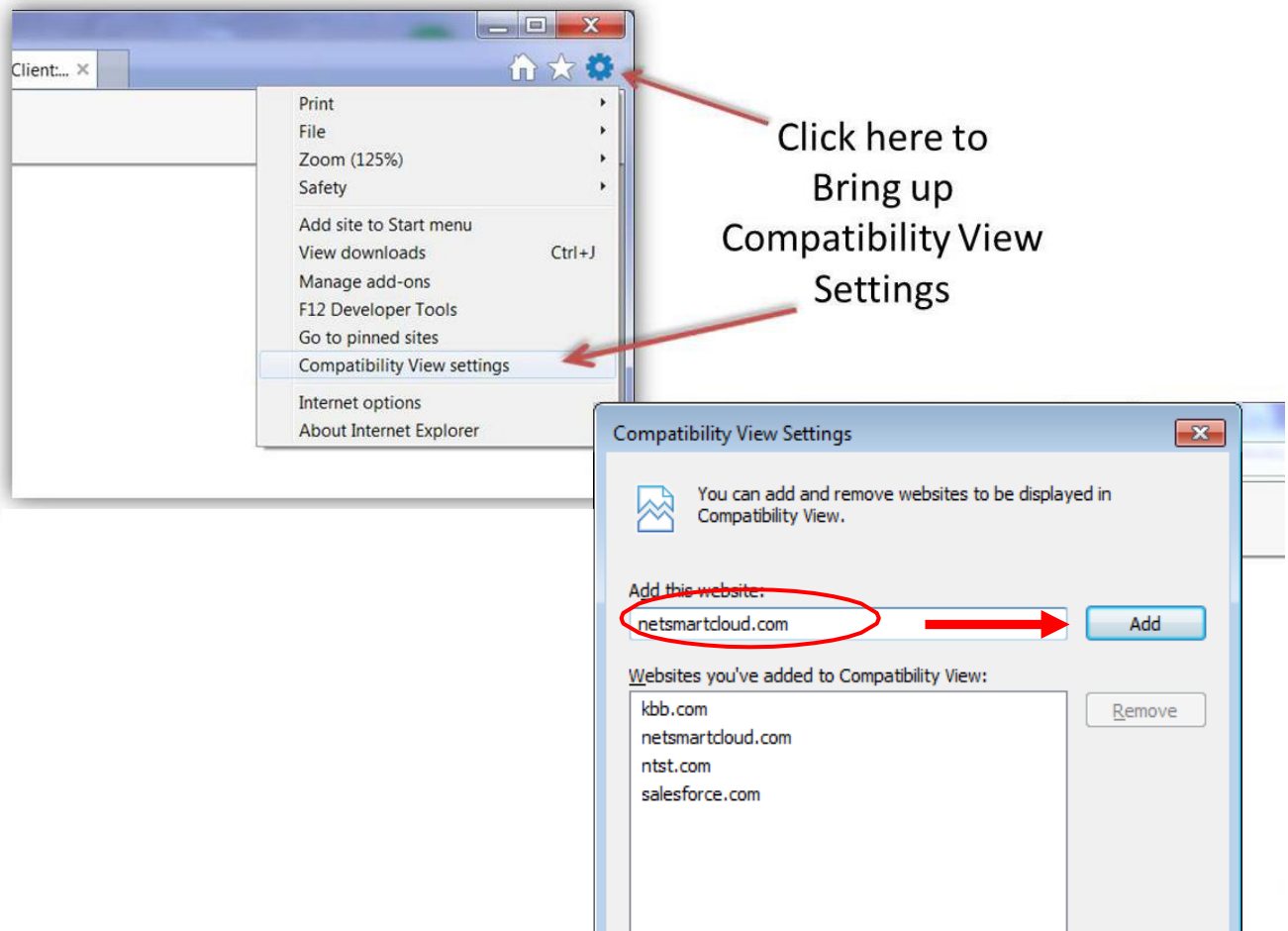
Change Compatibility View Settings for Internet Explorer 10

- Click on the Tools menu then choose Compatibility View Settings
- Click on “Add”
- Click on close

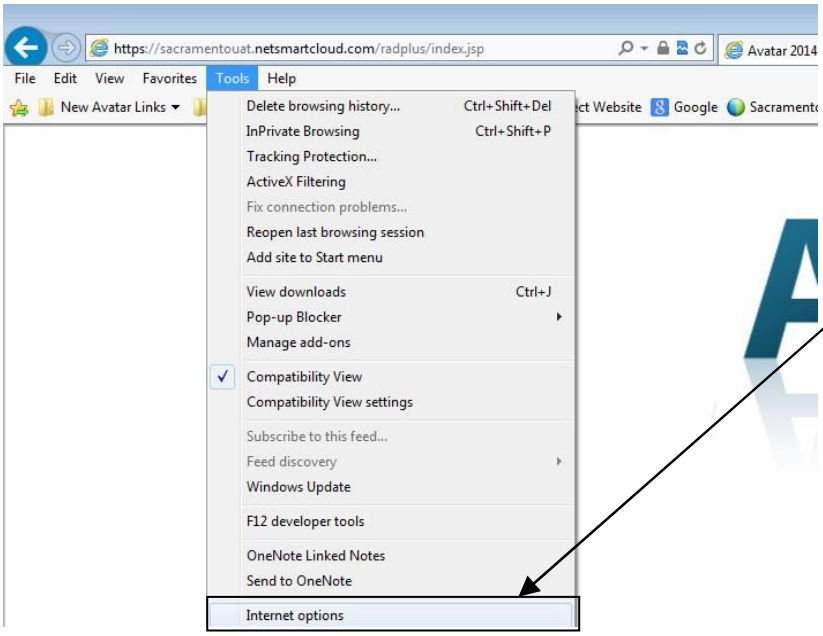
- If they cannot see the Tools menu, have the user click on the “Alt” key on the keyboard to show the menu.



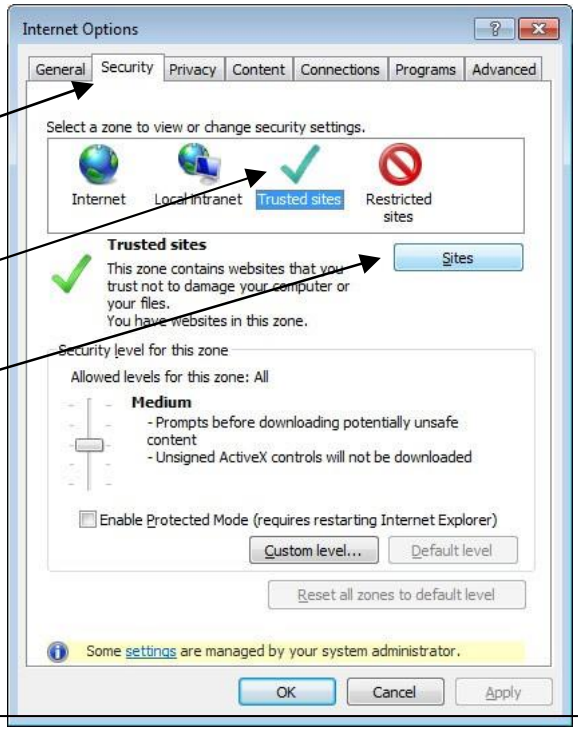
Change Compatibility View Settings for Internet Explorer 11
For IE 11 use the path below



1. Add Netsmartcloud to trusted sites-



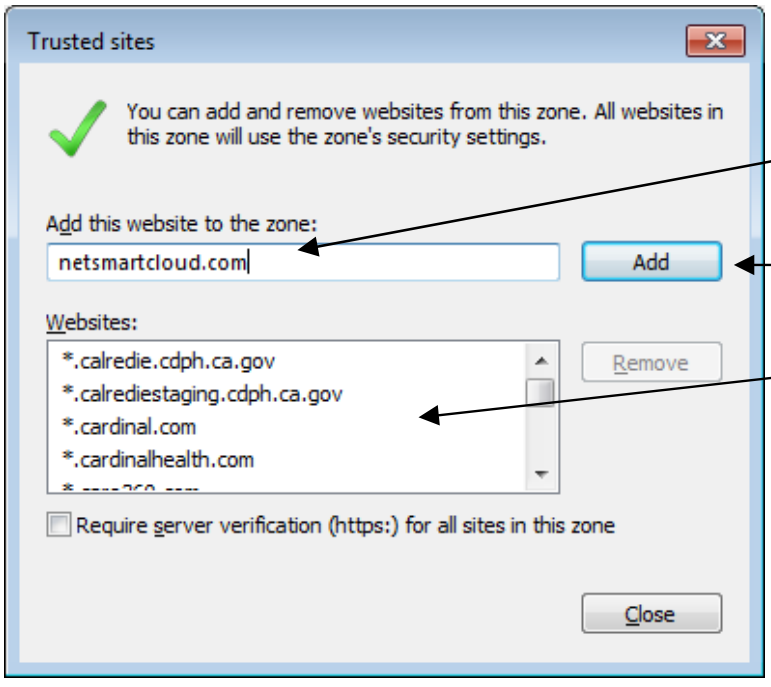
Select “Internet Options”



Click on the Security tab

Click the “Trusted Sites” icon Click on

the Blue “Sites” button



netmsartcloud.com should appear in the “Add this website to the zone” If it

does click the “Add” button

If not it may already be on the websites list.

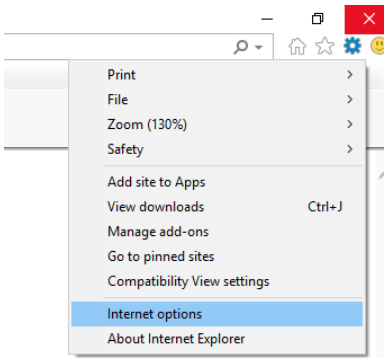
Make sure to have them Restart the computer after making these changes Then have them Re-launch Avatar

Temporary Fix instructions for Perceptive

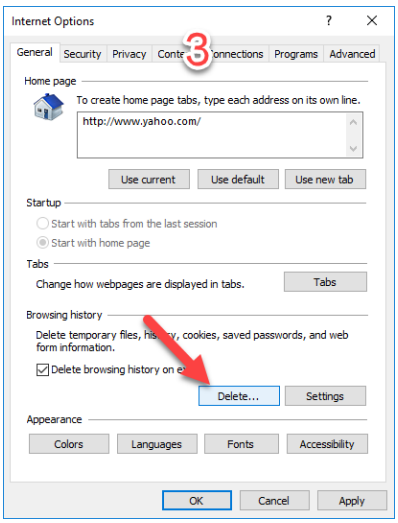
Clear Internet Explorer browser files and Java Files

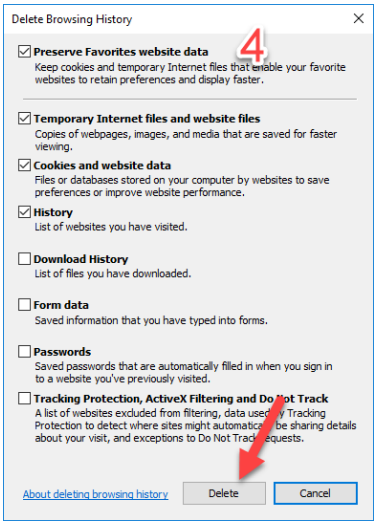
How to clear Internet Explorer temporary files

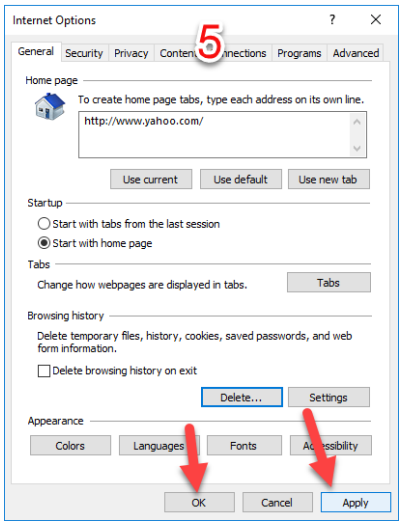
1. Close out of Avatar completely
2. Go to any Internet Explorer browser. Click on the Setting icon and select “Internet Options”



3. Click on the “Delete” button
4. Select what data you want to Delete.
5. Click Delete
6. Click “Apply” and “Ok”

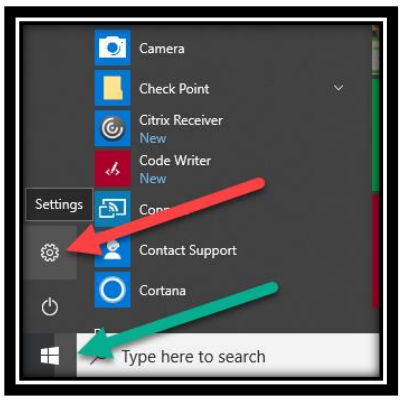




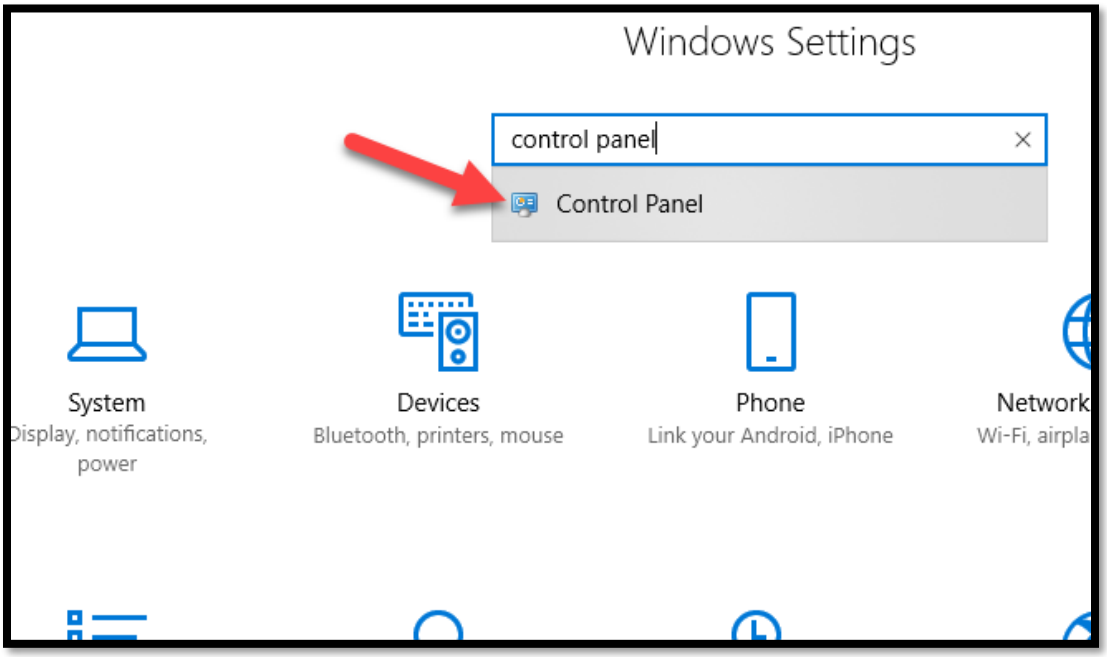


Java Temporary File deletions Windows 10

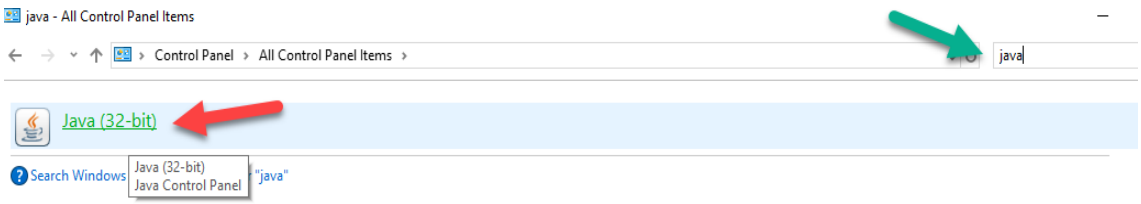
1. Click on the Start icon on the bottom left of computer screen
2. Select the “Settings” icon



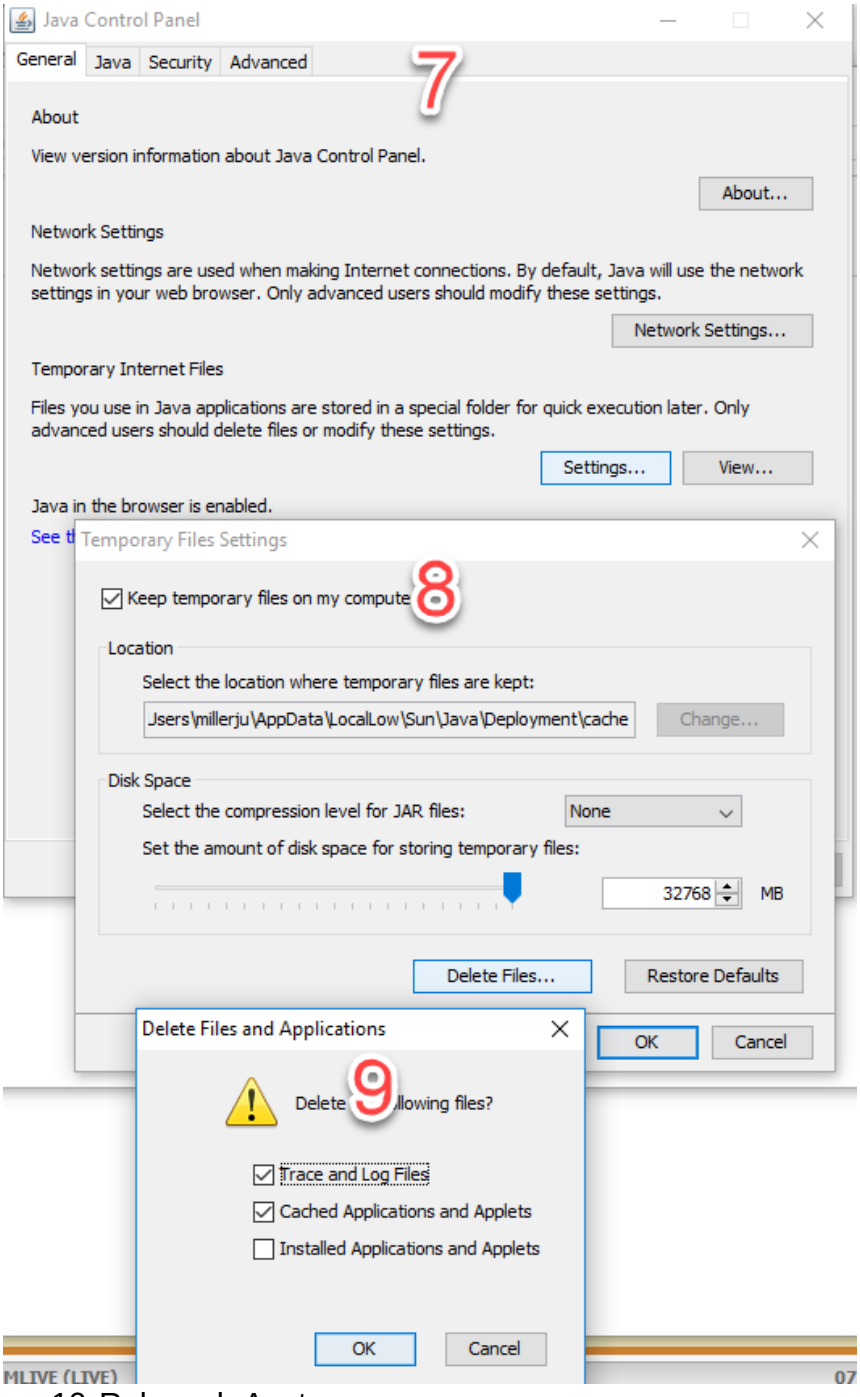
3. In the “Windows Settings” search for “Control Panel”
4. Select Control Panel by clicking on the search result



5. In the “Control Panel” windows search for “Java”
6. Click on the “Java (32bit)” to open the control panel



7. Click on the “Settings” button
8. Click on “Delete Files”
9. Select the selections you want and click “Ok”



10. Relaunch Avatar